

Movin' em Up!

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So many {insert your clientele
here}

So few dollars

Your community expects you to do more, serve more, create
more of a difference – but with the same budget as 2015

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Expectations v Realities

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- Examine your revenue streams

Is the ROI worth the effort?
Are you willing to “Bless & Release?”

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Donors (Individual & Corporate) Special Events Grants

Even if it means you scale back for a while?

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	B	C	D	E	F	G	H	I	J
1	1,256 Total Donors from Calendar year 2012-2016								
2									Lapsed donor from 2015 to 2016
3	Name	2012	2013	2014	2015	2016			New or Reengaged Donor in 2016
4	Donor 1	\$0.00	\$0.00	\$0.00	\$0.00	\$100.00	100.00		
5	Donor 2	\$0.00	\$0.00	\$0.00	\$0.00	\$10.00	10.00		
6	Donor 3	\$0.00	\$0.00	\$200.00	\$0.00	\$0.00	0.00		
7	Donor 4	\$0.00	\$0.00	\$46.80	\$15.60	\$0.00	(15.60)		
8	Donor 5	\$0.00	\$0.00	\$60.00	\$0.00	\$60.00	60.00		
9	Donor 6	\$0.00	\$0.00	\$0.00	\$0.00	\$40.00	40.00		
10	Donor 7	\$0.00	\$0.00	\$0.00	\$0.00	\$1,060.00	1060.00		
11	Donor 8	\$0.00	\$0.00	\$0.00	\$90.00	\$0.00	(90.00)		
12	Donor 9	\$1,250.00	\$2,000.00	\$3,000.00	\$0.00	\$3,000.00	3000.00		
13	Donor 10	\$0.00	\$0.00	\$0.00	\$0.00	\$1,000.00	1000.00		
14	Donor 11	\$0.00	\$0.00	\$0.00	\$65.00	\$0.00	(65.00)		
15	Donor 12	\$0.00	\$60.00	\$0.00	\$0.00	\$0.00	0.00		
16	Donor 13	\$0.00	\$0.00	\$100.00	\$100.00	\$0.00	(100.00)		
17	Donor 14	\$4,000.00	\$2,000.00	\$2,000.00	\$2,000.00	\$4,000.00	2000.00		
18	Donor 15	\$0.00	\$0.00	\$100.00	\$0.00	\$0.00	0.00		
19	Donor 16	\$0.00	\$0.00	\$150.00	\$75.00	\$150.00	750.00		
20	Donor 17	\$0.00	\$0.00	\$0.00	\$25.00	\$0.00	(25.00)		

Donor Names & Amounts No Repeat DonorNames Sheet1 + 1

READY

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Donor Giving Trends 2016

New Donors: 176

$176/1214 = 14.5\%$

Re-engaged Donors: 67

$67/1214 = 5.5\%$

Deceased Donors: 253

$253/1214 = 20.8\%$

Repeated Donors: 147

$147/1214 = 12.1\%$

Lost donors: 571

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What happened?

Our goal:
Did we make it?

Which group will be our focus in 2017?
Do we go with the “low hanging fruit” for the easy wins?

What is our goal for 2017?
\$ or %

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What worked?

How do we make it happened?

Touches
Donor focused marketing
Phone calls
With physical expansion – INVITE THEM DOWN

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Where and How to Start?

1. Donor list
2. 2015 v 2016 (or whatever data you have)
3. Examine your needs. Be sure your plan fits your realities
4. Be specific with what you want from donors
5. Share hits/misses with Board members

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How to Start

	A	B	C	D	E	F	G	H	I
1		<u>FY13-14</u> Actual	<u>FY14-15</u> Actual	<u>FY15-16</u> Actual	<u>FY16-17</u> Projected	<u>FY17-18 Goal</u>		<u>Formulas</u>	
2	Summary Data								
3	Total \$ Raised (ind, corp, fdn)*								
4	Total \$ from INDIVIDUALS								
5	% from INDIVIDUALS							=total individual \$ / total \$ raised	
6	Number of INDIVIDUAL donors							UNDUPLICATED. # DONORS not # GIFTS	
7	Average gift per INDIVIDUAL							=number of donors / \$ from donors	
8									
9	Donor Development Data****								
10	# of INDIVIDUAL donors lost							= number of donors from the previous year who did not give any gift at all in the current year	
11	% of INDIVIDUALS lost**							= number of donors lost / total # of INDIVIDUAL donors in the previous year	
12	# of INDIVIDUAL donors increased							= number of donors whose total gift was more this year than last year.	
								=number of increased donors / total # of	

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The Data Doesn't Lie!

	A	B	C	D	E	F	G	H
1		<u>FY13-14</u> Actual	<u>FY14-15</u> Actual	<u>FY15-16</u> Actual	<u>FY16-17</u> Projected	<u>FY17-18 Goal</u>		Formulas
2	Summary Data							
3	Total \$ Raised (ind, corp, fdn)*	\$ 1,664,208	\$ 1,545,546	\$ 1,883,642	\$ 2,155,834			
4	Total \$ from INDIVIDUALS	\$ 633,499	\$ 706,929	\$ 673,673	\$ 859,156			
5	% from INDIVIDUALS	38%	46%	36%	40%			=total individual \$ / total \$ raised
6	Number of INDIVIDUAL donors	294	242	327	370			UNDUPLICATED. # DONORS not # GIFTS
7	Avg INDIVIDUAL gift	\$ 2,155	\$ 2,921	\$ 2,060	\$ 2,322			
8								
9	Donor Development Data***							
10	# of INDIVIDUAL donors retained		176	121	167			= total number of donors - (number of donors from the previous year who did not give any gift at all in the current year)
11	% of INDIVIDUALS retained		60%	50%	51%			= number of donors retained / total # of INDIVIDUAL donors in the <u>previous</u> year
12	# of INDIVIDUAL donors increased		52	49	37			= number of donors whose total gift was more this year than last year.
13	% of INDIVIDUALS increased		21%	15%	10%			=number of increased donors / total # of INDIVIDUAL donors <u>this</u> year.
14	# of INDIVIDUAL donors decreased		50	42	32			= number of donors whose total gift was more this year than last year.

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Questions?

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Copies of the
Donor Worksheet
Slides 11 & 12 are available.

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